

U.S. Catfish Industry and Foreign Trade: A Fact Sheet

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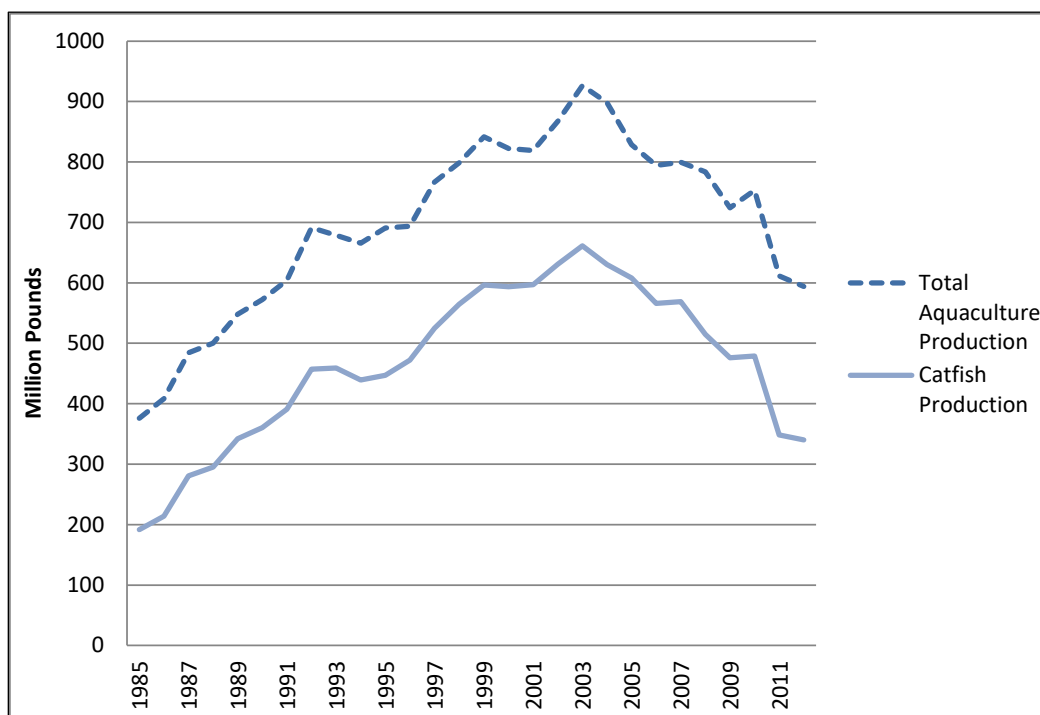
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U.S. Aquaculture Production and Catfish Farming

Aquaculture refers to the breeding, rearing, and harvesting of animals or plants in water environments, such as ponds, lakes, and oceans. It includes the production of seafood from hatchery fish which are grown to market size in controlled environments. In the United States, channel catfish (*Ictalurus punctatus*)—which represented approximately 57% of total U.S. aquaculture production by weight and 26% by value in 2012—has declined significantly over the last decade (see Figure 1). By volume, domestic catfish production in 2012 (the most recent available data from National Marine Fisheries Service) was about half of what was produced in 2003. This decline occurred for a number of reasons including higher domestic production costs and an increased global supply of lower-priced aquaculture products.

Figure 1. U.S. Aquaculture Production



Source: National Oceanic and Atmospheric Administration (NOAA), *Fisheries of the United States 2013: Current Fishery Statistics*, no. 2013, September 2014.

Catfish are farmed primarily in Mississippi, Alabama, and Arkansas. The water surface area used for catfish production in these three states totaled 63,000 acres in 2014, about 82% of total acres in production. Less than 1% of catfish produced in the United States is exported.

Table I. Catfish Production by Major States
(2014)

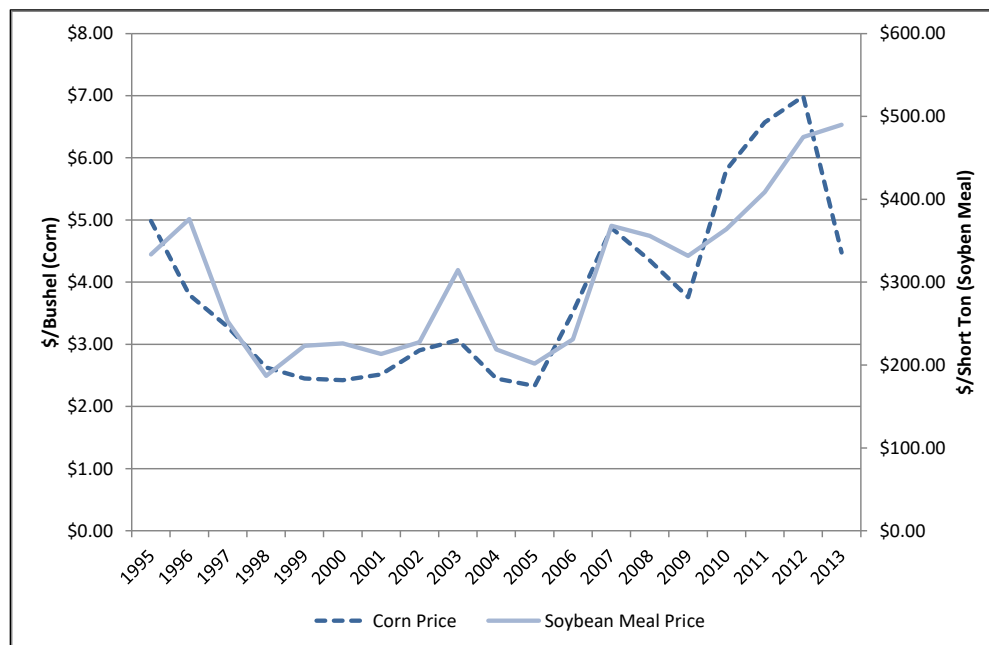
State	Acres of Water in Production	Food Size Inventory (thousands of pounds)	Annual Food Size Sales (in thousands)
Mississippi	41,300	110,600	\$176,035
Alabama	16,300	67,500	\$104,247
Arkansas	6,100	16,330	\$18,232
Other	7,925	21,286	\$33,868
Total	77,725	215,716	\$332,382

Source: U.S. Department of Agriculture (USDA), National Agricultural Statistics Service (NASS), "Quick Stats."

Notes: Inventory measured January 1, 2014. Acres in production measured from January 2014 through December 2014.

The prices of industry inputs—such as soybean meal and corn, which are used to manufacture catfish feed—have increased significantly during this period of industry decline (see Figure 2). From 2003 through 2013, in real 2013 dollars, soybean meal prices increased by 156% and corn prices increased by 146%. However, corn prices decreased from 2012 to 2013.

Figure 2. Catfish Feed Input Prices
(real 2013 dollars)



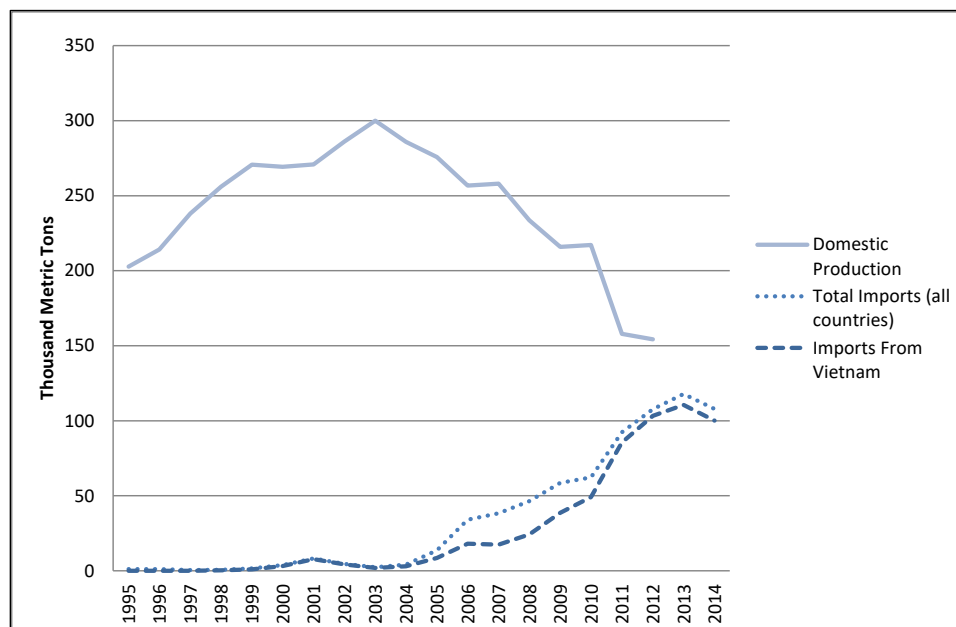
Sources: USDA, NASS, "Quick Stats," and USDA, Economic Research Service, *Oil Crops Yearbook*, Table 4: Soybean Meal Price.

Notes: All values in 2013 real dollars (USDA, Economic Research Service [ERS] historical gross domestic product [GDP] deflator).

U.S. Imports

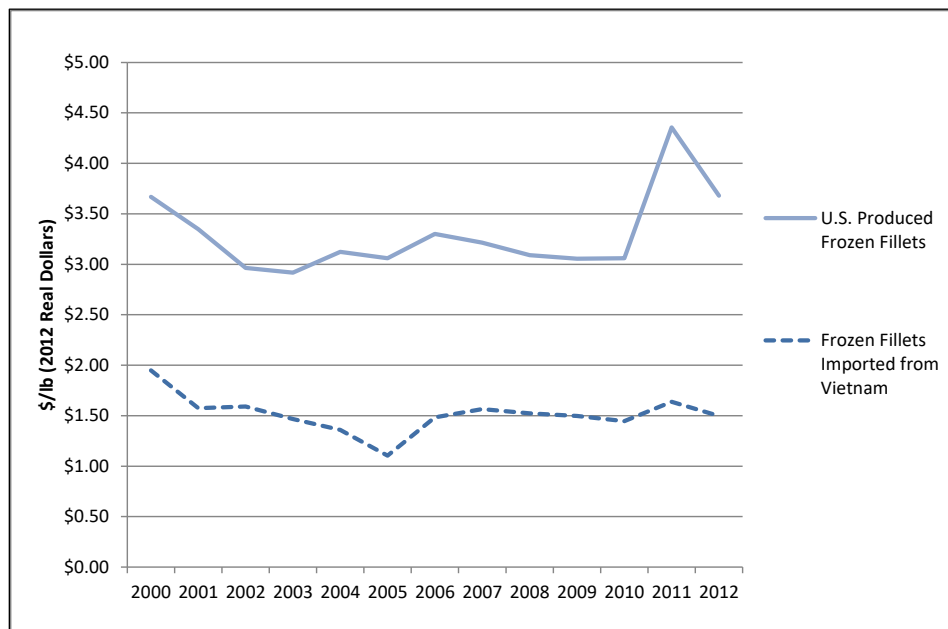
The total global catch of all edible products from wild fisheries has remained essentially flat in the last decade, but global aquaculture production has increased substantially, particularly in Asia, the world's largest producer of aquaculture products. Several countries, primarily Vietnam, have become major exporters of frozen catfish fillets to the United States and have secured a growing share of the domestic market (see **Figure 3**). In 2003, U.S. catfish imports were 2,500 metric tons; in 2012, U.S. imports increased significantly to 108,000 metric tons. Prices of imported frozen catfish fillets from Asian countries have been significantly lower than domestic prices, making imports competitive in U.S. markets (see **Figure 4**).

Figure 3. U.S. Catfish Production and Catfish Imports



Sources: NOAA, *Fisheries of the United States 2013: Current Fishery Statistics*, no. 2013, September 2014, and NOAA, National Marine Fisheries Service, Fisheries Statistics and Economics Division, "Annual Trade Data by Product, Country/Association."

Figure 4. Market Prices of Frozen Catfish Fillets
(real 2012 dollars)



Source: NOAA, “Commercial Fisheries Statistics,” NOAA, National Marine Fisheries Service, Fisheries Statistics, and Economics Division, “Annual Trade Data by Product, Country/Association,” and USDA, NASS, Catfish Processing.

Notes: Import price determined by total imports’ value frozen fillets divided by total pounds. Domestic prices of frozen catfish fillets reported by USDA. All values in 2012 real dollars (USDA, ERS historical GDP deflator).

Congressional and Administrative Actions

Congress and the Administration have taken several actions to assist the U.S. catfish industry.

- In 2002, Congress passed legislation that only allowed fish in the family *Ictaluridae*, the family of catfish raised in the United States, to be labeled or advertised as “catfish.” These labeling requirements prohibited the labeling of Vietnamese basa (*Pangasius bocourti*) and tra (*Pangasius hypophthalmus*) as catfish.¹
- In 2003, the International Trade Administration imposed antidumping duties on certain frozen fillets from Vietnam.² These antidumping duties were upheld by the U.S. International Trade Commission in 2009 and again in 2014.
- In 2008, Congress passed legislation to transfer responsibilities for food safety and inspection of catfish from the Food and Drug Administration to the U.S. Department of Agriculture (USDA) and to designate *catfish*, as defined by the Secretary of Agriculture, as an “amenable species” that would be subject to mandatory inspection. A broad definition of *catfish* would have required inspection programs for imported species such as basa and tra to be equivalent to

¹ P.L. 107-171, §10806.

² International Trade Administration, “Notice of Antidumping Duty Order: Certain Frozen Fish Fillets from the Socialist Republic of Vietnam,” 68 FR 47909, August 12, 2003.

USDA requirements.³ USDA rulemaking that would have defined catfish has not been finalized.

- In response, the 2014 farm bill requires inspection of all fish in the order Siluriformes, a broad definition of catfish that includes basa and tra, according to USDA requirements.⁴ The law requires the USDA's Food Safety and Inspection Service to review the production of catfish by other nations that export to the United States to determine whether they meet USDA standards. The final rule is still under review by the Office of Management and Budget.

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³ P.L. 110-246, §11016.

⁴ P.L. 113-79, §12106.